



Nurturing Successful Businesses

Executive Finance Review Meeting

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EXECUTIVE FINANCE REVIEW MEETING

The annual compliance requirements associated with operating your business through a limited company, are only part of the value that a commercially experienced accountant can provide to a business.

Accountants can also have a **significant impact** on the ability of a business to grow and develop successfully, through the following:

- a) *helping to implement key systems and processes*
- b) *providing tight fiscal (cost / pricing) and operational control*
- c) *enabling better and more effective decisions to be made by the business owners*

However, for many 'start ups' and early stage businesses, they are not yet at the point where they are willing to, or even able to, afford significant accountancy fees for commercial or strategic advice on their business, **even where they understand the importance or value this can provide !**

Therefore the Executive Finance review meeting, whether on a quarterly or monthly basis, is our solution:

- straightforward opportunity for practical, commercial business advice for a simple, fixed fee
- encouraging business owners to keep the importance of basic financial information in mind
- providing direction on identifying Key Performance Indicators (KPIs) at as early a stage as possible
- having access to an external, experienced professional to help resolve business issues and problems from time to time
- encouraging business owners to look forward and react quickly and effectively to events or opportunities that may arise



Damian Connolly FCCA
Managing Director

HOW WILL IT BENEFIT ME & MY BUSINESS ?

WHY?

- 1 59% of new UK businesses fail before five years and only 3% with one employee ever grow beyond 10 employees, with the biggest reasons given for failure or stagnation being a lack of cash, poor pricing and/or the lack of a clear business model
- 2 Especially suitable for 'start up' or 'early stage' businesses, where bookkeeping and financials are dealt with internally (typically by the business owner)
- 3 Provides access to experienced financial and business advice for the business, without commitment to ongoing substantial fees
- 4 Highlights the importance of maintaining focus on key financials for the business i.e. sales and turnover, gross margin(s), level of overheads, operating profit(s) etc.
- 5 Identifies any specific compliance errors or omissions which require correction i.e. non submission of P11ds, inaccurate VAT returns, availability of employment allowance
- 6 Provides an opportunity for various financial or other queries to be raised by the business owner and resolved during the course of the financial year

BENEFITS?

- 1 With over 15 years' experience of working in SMEs in a variety of business sectors, our advice is based on practical, 'real world' and 'best practice' solutions
- 2 Identifies financial and other risks facing the business at an early stage, allowing them to be managed or mitigated ahead of time
- 3 Enables the business to avoid mistakes and errors typical to 'start ups' e.g. poor management of cash, lack of credit control etc.
- 4 Enables strategic financial issues (key to successfully growing the business), to be raised at an early stage with business owners e.g. budgets, cashflow management, KPIs, finance/ investment etc.
- 5 Provides post meeting accountability through use of action points to deliver on agreed progress
- 6 Supports the ability to make better and more informed business decisions i.e. on potential opportunities, marketing and overhead spend, new business etc.

PRICING

QUARTERLY

£300.00

P.QTR. (excl VAT)

MONTHLY

£250.00

P.M. (excl VAT)

EXECUTIVE FINANCE REVIEW

For ambitious 'Start ups' and growing SME's to make more effective decisions

- Two hour meeting (onsite or offsite) ✓
- Preparation of an agreed Agenda ahead of the meeting ✓
- Focus on financial information and other Key Performance Indicators (KPIs) ✓
- Review of previously agreed actions to assist with maintaining progress post meeting ✓
- Opportunity to discuss and find a solution to specific business issues with external advisor ✓
- Preparation of meeting minutes which highlight agreed actions for all parties ✓

sakura

Passionate about your business

WHAT OUR CLIENTS SAY ABOUT US



“Damian invested the time to fully understand our business and proved invaluable to us successfully winning investment. His ability to calmly review the facts and to add key insight when required allowed us to meet some steep challenges with confidence. He is an essential part of the team”

Adam Porter Blake, Chairman and CEO, Brighter Environment



“Sakura Business Solutions has helped us to understand our business performance much better. I would most definitely recommend Sakura’s services for start-ups and small/medium-sized businesses.”

Alex Dawe, Managing Director, Quarantine Productions

“I have really valued your contribution to the business in this and previous years. I find your input in our strategic discussions very important”

WHAT'S NEXT



Should you decide to take advantage of the Executive Finance Review Meeting programme, below are the key details:

- We set the date and agree on an agenda ahead of our initial meeting, identifying any information or documents required at the meeting
- We will obtain confirmation of the identity of each officer and/or shareholder from you e.g. copy passport and recent utility bill/bank statement
- If the service was as valuable to you as we expect, then we will agree and diarise the next three quarterly meeting dates
- We obtain completed and/or signed copies of our letter of engagement and new client information sheet from you
- We will forward a welcome pack with information about Sakura and what to expect from us as one of our clients

OTHER RELATED SERVICES

- **Financial Performance Services**
- **Bookkeeping services**
- **Self Assessment Tax Return service**

sakuraⁱ

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